

What is claimed is:

1. A method for providing services, comprising:
(a) collecting information from a client;
5 (b) assessing the client's needs; and
(c) fulfilling the client's needs according to criteria generated during step (b) of
assessing, by optimally selecting and providing services from a modifiable group of
service providers.

10 2. The method of claim 1, wherein the step (a) of collecting is performed by a dedicated
client services team.

3. The method of claim 1, wherein the step (b) of assessing is performed by a dedicated
client services team.

4. The method of claim 1, wherein the step (c) of fulfilling comprises maintaining
custody over documents and data.

15 5. The method of claim 1, wherein the step (c) of fulfilling comprises filing of financial
or other reports as required by law or by other considerations.

6. The method of claim 5, wherein the reports comprise filings related to multiple
assets.

7. The method of claim 5, wherein the reports comprise filings related to multiple
20 institutions.

8. The method of claim 1, wherein the step (c) of fulfilling comprises rendering of tax
advice and filing of federal, state, and local tax statements, as appropriate.

9. The method of claim 1, wherein the step (c) of fulfilling comprises estate planning
and related transactions.

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10. The method of claim 1, wherein the step (c) of fulfilling comprises general or specialized legal services.

11. The method of claim 1, wherein the step (c) of fulfilling comprises accounting services.

12. The method of claim 1, wherein the step (c) of fulfilling comprises bookkeeping services.

13. The method of claim 1, wherein the step (c) of fulfilling comprises record keeping.

14. The method of claim 1, wherein the step (c) of fulfilling comprises selection of financial investments.

15. The method of claim 1, wherein the step (c) of fulfilling comprises managing financial assets within a portfolio.

16. The method of claim 1, wherein the step (c) of fulfilling comprises management and other services related to closely held stock.

17. The method of claim 1, wherein the step (c) of fulfilling comprises services related to international trusts.

18. The method of claim 1, wherein the step (c) of fulfilling comprises real estate services.

19. The method of claim 1, wherein the step (c) of fulfilling comprises public relations or other crisis management services.

20. The method of claim 1, wherein the step (c) of fulfilling comprises selection and delivery of insurance services.

21. The method of claim 1, wherein the step (c) of fulfilling comprises services related to the selection and delivery of physical, personal, and information security.

22. The method of claim 1, wherein the step (c) of fulfilling comprises assistance with the lease, purchase, or fractional ownership of automobiles, planes, or yachts.

23. The method of claim 1, wherein the step (c) of fulfilling comprises personal concierge services.

24. The method of claim 1, wherein the step (c) of fulfilling comprises bill paying services.

25. The method of claim 1, wherein the step (c) of fulfilling comprises coordination and direction of charitable activities.

26. The method of claim 1, wherein the step (c) of fulfilling comprises the performance of background checks on personal staff or other parties.

27. The method of claim 1, wherein the step (c) of fulfilling comprises the offering of investment opportunities not available to non-clients.

28. The method of claim 1, wherein the step (c) of fulfilling comprises the development and execution of debt reduction strategies.

29. The method of claim 1, wherein the step (c) of fulfilling comprises advice, and other services, related to the development and maintenance of educational funds.

30. The method of claim 1, wherein the step (c) of fulfilling comprises advice, and other services, related to the care of infants, invalids, the elderly, or other persons.

31. The method of claim 1, wherein the step (c) of fulfilling comprises a core services provider group.

32. The method of claim 1, wherein the step (c) of fulfilling comprises business succession planning.

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33. The method of claim 1, wherein the step (c) of fulfilling comprises issuance of loans, traveler's checks, foreign currency, credit, or other banking services.

34. The method of claim 1, wherein the step (c) of fulfilling comprises an affiliated network of service providers.

35. The method of claim 1, wherein the step (c) of fulfilling comprises a group of non-affiliated service providers.

36. The method of claim 1, wherein a core service provider group is one of several pre-established groups of service providers.

37. The method of claim 1, wherein an affiliated network of service providers is one of several pre-established groups of service providers.

38. The method of claim 1, wherein non-affiliated service providers are one of several pre-established groups of service providers.

39. A system for providing services, comprising:

15 a depository of client information;

 means for obtaining access to the client information;

 means for coordinating services amongst all related service providers;

 means for communicating between and amongst service providers and the client; and

 means for performing analysis related to selectable objectives.

20 40. The system of claim 39, wherein the depository comprises an electronic database.

 41. The system of claim 39, wherein the depository comprises an electronic spreadsheet.

 42. The system of claim 39, wherein the depository comprises electronic documents.

 43. The system of claim 39, wherein the means for obtaining comprises a computer server.

44. The system of claim 39, wherein the means for obtaining apparatus comprises a communications link.

45. The system of claim 39, wherein the means for obtaining apparatus comprises a client computer.

5 46. The system of claim 39, wherein the means for obtaining apparatus comprises network enabled code.

47. The system of claim 39, wherein the means for coordinating apparatus comprises a computer server.

10 48. The system of claim 39, wherein the means for coordinating apparatus comprises a communications link.

49. The system of claim 39, wherein the means for coordinating apparatus comprises a client computer.

50. The system of claim 39, wherein the means for coordinating apparatus comprises a network enabled code.

15 51. The system of claim 39, wherein the means for communicating apparatus comprises a computer server.

52. The system of claim 39, wherein the means for communicating apparatus comprises a communications link.

20 53. The system of claim 39, wherein the means for communicating apparatus comprises a client computer.

54. The system of claim 39, wherein the means for communicating apparatus comprises network enabled code.

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Claims

55. The system of claim 39, wherein the means for analysis comprises a tool for mining data.

56. The system of claim 39, wherein the means for analysis comprises a synthetic logic tool.

57. The system of claim 56, wherein the synthetic logic tool converts data into useful information related to established objectives.